Office of the U.S. Global AIDS Coordinator

PEPFAR Data for Accountability Transparency Impact Monitoring (DATIM)
End User Training Manual

Version 0.6

November 2014

This information has been prepared solely for the use and benefit of the U.S. Department of State's Office of the U.S. Global AIDS Coordinator and is not intended for reliance by any other person.

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Document Version Control

Version	Date of Issue	Brief Description of Change
0.1	22 August 2014	Initial draft
0.2	5 September 2014	Revisions
0.3	26 September 2014	Revisions
0.4	14 October 2014	Revisions
0.5	24 November 2014	Revisions
0.6	30 November 2014	Revisions; contextualizing guide to Demoland Environment

1.0 Getting Started with PEPFAR DATIM as end-user

1.1 Getting Started with PEPFAR DATIM

After reading this chapter you will be able to understand:

- How to open the PEPFAR DATIM application
- How to log in and out of the application
- How to navigate the application and access its features

1.2 Opening PEPFAR DATIM

PEPFAR DATIM is a web-based application and will be available in an Internet browser when you have Internet connection.

Open a browser, we recommend Google Chrome (download installer here: http://www.google.com/chrome) and in the address field you type in the URL of PEPFAR DATIM.

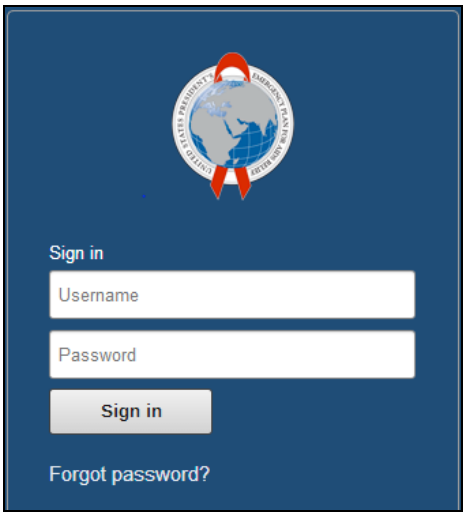
You will then see the login screen of PEPFAR DATIM.

1.3 Logging in and out of the application

Once you can see the blue login screen PEPFAR DATIM you must enter your username and password to log in to the application.

If the login is not successful you will be notified that the username or password is incorrect and asked to re-enter these credentials. Once you have successfully logged in you will see the PEPFAR DATIM Dashboard where you can immediately monitor the latest data in your selected charts and access your favorite DATIM sites (reports, maps etc).

When you have finished your PEPFAR DATIM session we recommend that you log out before closing the browser. Use the logout link in the upper right corner and you will be returned to the log in screen.



1.4 Navigating the application

PEPFAR DATIM has two menu systems; the top menu which leads to the various modules, and the left side menu inside most modules to navigate between features inside each module.

The PEPFAR DATIM symbol in the top left corner is a fast link to the user-defined start page, the home page. Often this is set to the dashboard module.

The logout button is on the far right of the top menu.

1.5 The top menu – access to the modules

PEPFAR DATIM consists of various modules (major components) which each have specific features, such as data entry, reporting, dashboard. You can access these modules from the top menu either under Maintenance or Services. Maintenance is mostly used by system administrators that maintain the application and might not be visible. Services are where you will find the more operational features like data entry, data quality and reporting.

Under the top menu item Help you can access the built-in user manual, update your user details, or view information about the running PEPFAR DATIM application.

To move to a new module you need to move the mouse pointer to one of the top menu items; Maintenance, Services, or Help. Then a submenu with modules will appear. Click on the module you would like to open.

1.6 Navigation inside modules

When you open most of the modules you will see the module main page which lists the major submodules or features in the middle of the screen with a short description. Simply click on the feature you would like to open. When inside a module you will always see the left side menu with links to its features. Use this menu to jump between features.

The data entry and dashboard modules do not have a menu system as they only contain one feature; everything is in one page, so no need for a menu there.

2.0 Data Entry

2.1 Data entry with PEPFAR DATIM

To open the data entry window click on the services tab displayed in the main menu. A drop down menu will appear listing the services provided by PEPFAR DATIM. Click on the Data Entry option.

The data entry module is where data is manually registered in the PEPFAR DATIM database. Data is registered for an organization unit, a period, and a set of data elements (data set) at a time. A data set often corresponds to a paper-based data collection tool

2.2 Selecting the data entry form

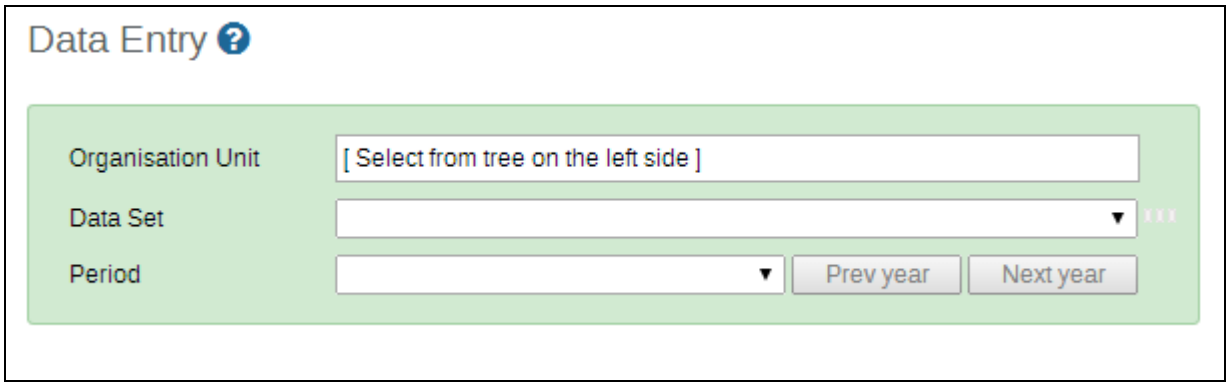
To start entering data the first step is to open the correct form by following these steps:

1. Locate the Organizational Unit you want to register data for in the tree menu to the left. Expand and close branches by clicking on the +/- symbols. A quick way to find an Organizational Unit is to use the search box just above the tree (the green symbol), but you need to write in the full name to get a match.

2. Select a data set from the dropdown list of data sets available to your selected Organizational Unit.

3. Select a period to register data for. The available periods are controlled by the period type of the data set (reporting frequency). You can jump a year back or forward by using the arrows above the period.

By now you should see the data entry form. From a form design perspective, there are three types for forms: default forms, section forms and custom forms. If a custom form exists, it will be displayed, followed in order of precedence by a section form, and finally a default form.



2.3 Entering data

Start entering data by clicking inside the first field and type in the value. Move to the next field using the Tab button. Shift+Tab will take you back one step. You can also use the "up" and "down" arrow keys to navigate between the form cells. The values are saved immediately and do not require to be saved at a later stage. A green field indicates that the value has been saved in the system (on the server).

Input validation: If you type in an invalid value, e.g. a character in a field that only accepts numeric values you will get a pop-up that explains the problem and the field will be colored yellow (not saved) until you have corrected the value. If you have defined a min/max range for the field (data element+organization unit combination) a pop-up message will notify you when the value is out of range, and the value will remain unsaved until you have changed the value (or updated the range and then re-entered the value).

Disabled fields: If a field is disabled (grey) it means that the field can and should not be filled. The cursor will automatically jump to the next open field.

Data history: By double-clicking on any input field in the form a data history window opens showing the last 12 values registered for the current field (organization unit+data element+categoryoptioncombo) in a bar chart. This window also shows the min and max range and allows for adjusting the range for the

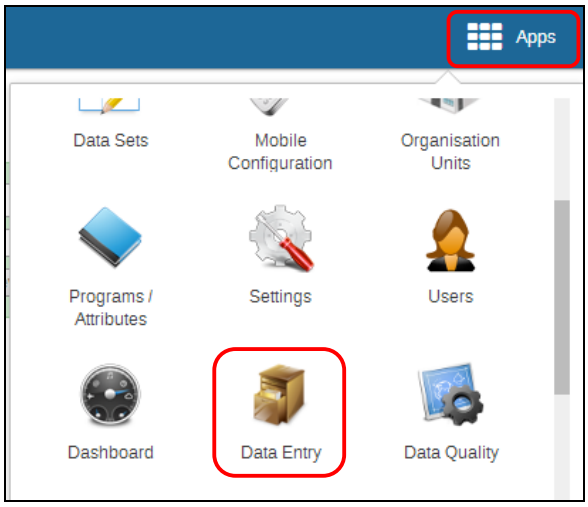
specific organization unit and data element combination.

Follow Up: In the data history window there is also a feature to tag or star a value. E.g. a suspicious value that needs further investigation can be kept in the system, but marked for Follow-Up. In the Data Quality module you can run a Follow-Up analysis and view all values marked for Follow-Up, and then later edit the values if proved incorrect.

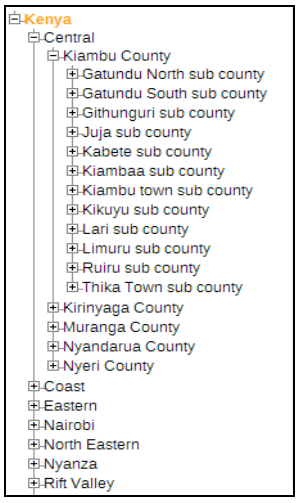
2.4 MER Data Entry

To enter MER data:

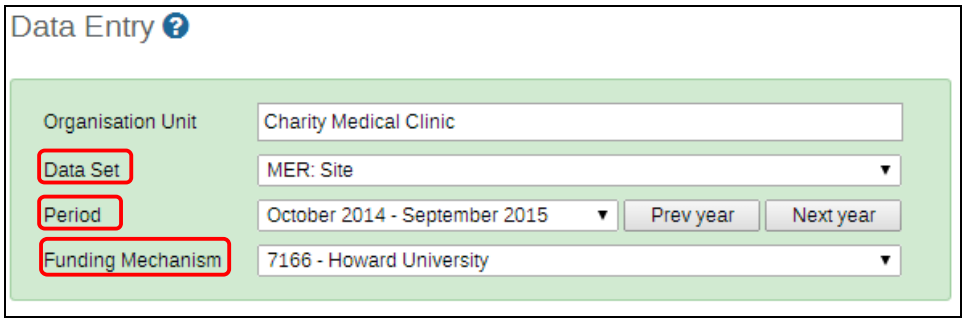
1. From the Apps button on the blue navigation ribbon located at the top of the home screen, select **Data Entry**.



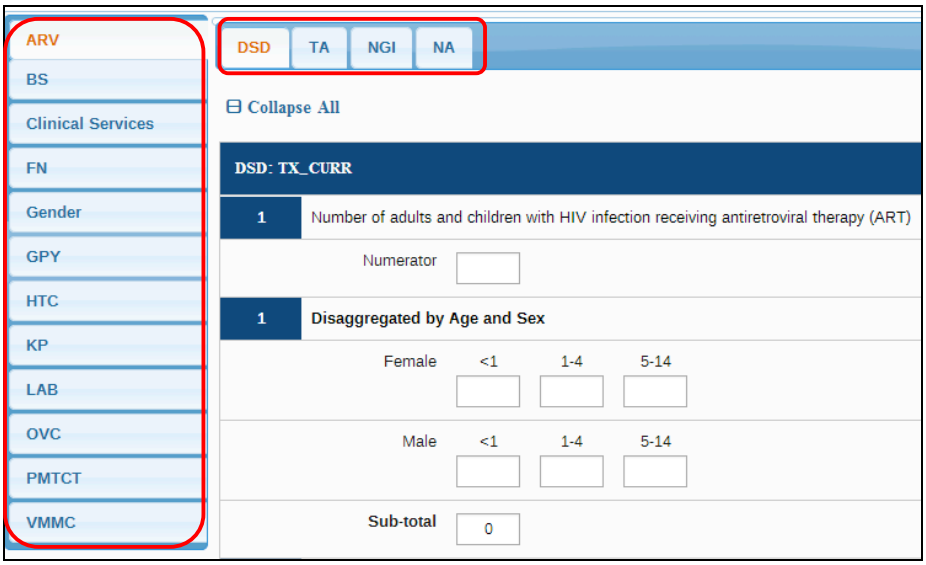
2. Once the Data Entry page displays, select your desired reporting location (reporting can be done at the site level) from the dropdown list on the left-hand navigation bar. This will allow you to select the desired mechanism and data set.



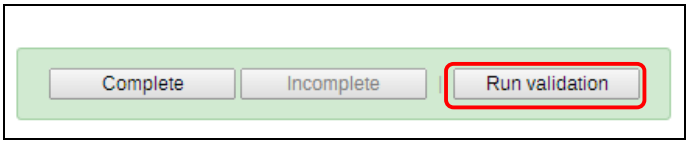
3. From the Data Entry form, enter desired data in the **Data Set, Period,** and **Funding Mechanism** fields.



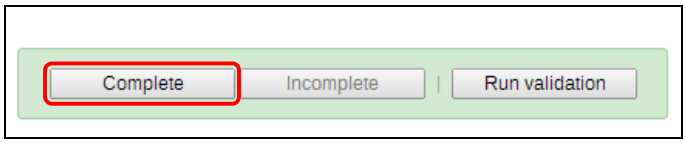
4. Once a **Funding Mechanism** is selected from the dropdown list, the applicable MER data entry form will display and data can be entered into the desired fields. The tabs located on the left-hand navigation panel allow for the selection of applicable indicators. The tabs located along the top of the MER form allow fore the selection of "Type of Service."



5. Once all data has been entered for the specified data set, click the **Run Validation** button to ensure that data entered in an acceptable format.

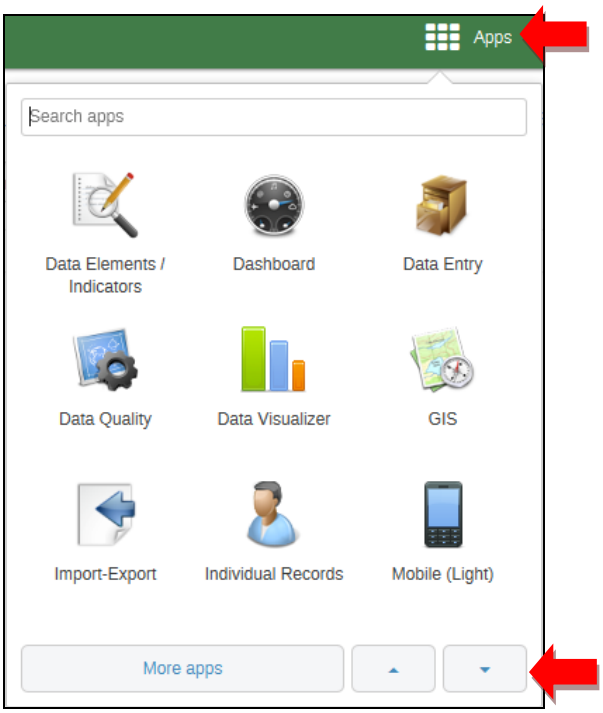


6. Once the data passes validation, click **Complete**. The data has now been submitted for approval and submission to the Country Team.

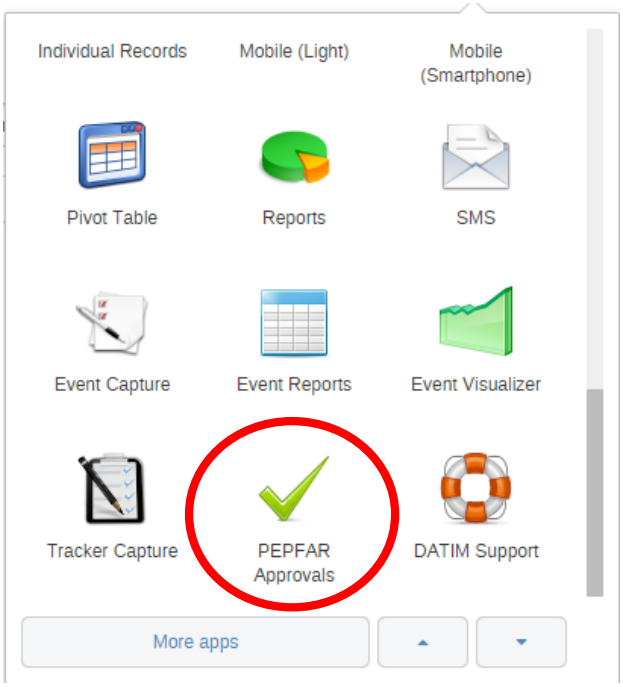


2.5 PEPFAR Approvals (Implementing Partners)

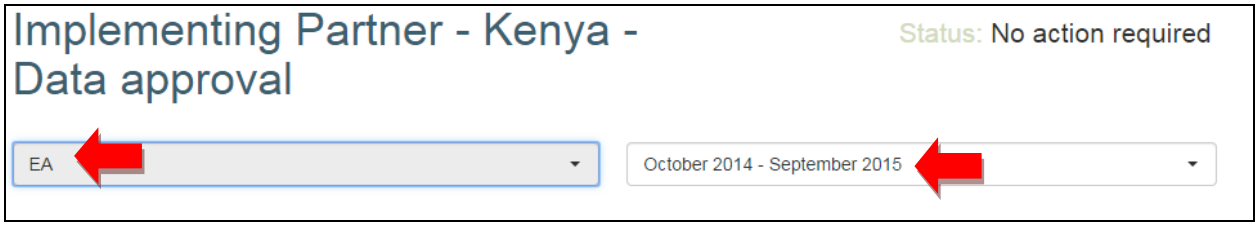
To begin the PEPFAR Approval process for indicator data pertaining to a mechanism, select the **Apps** feature on the navigation ribbon located at the top right of the screen. Once accessed, select the **arrow button** at the bottom of the App section to see more options (if necessary).



Use the side bar to scroll down to the bottom of the application options. Select **PEPFAR Approvals**, which will appear in the application list.

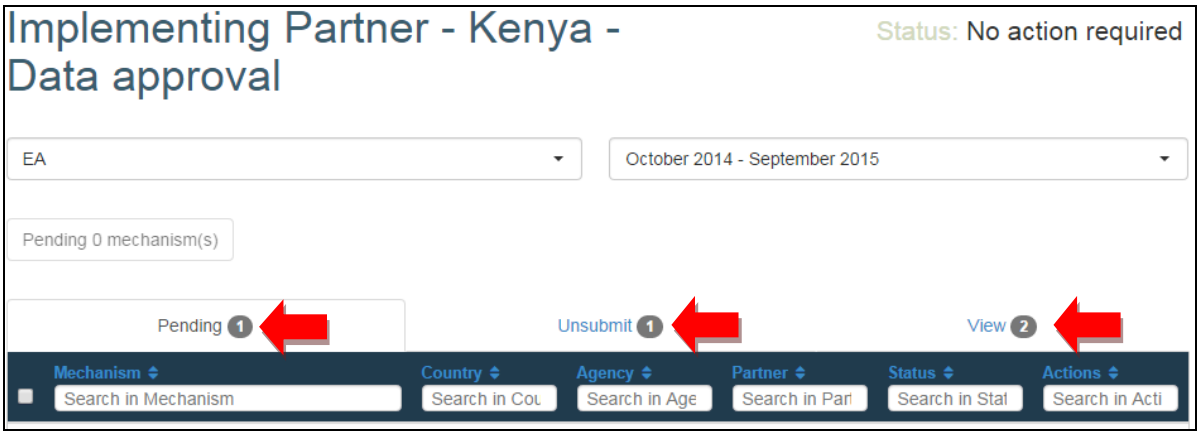


1. Once you have selected PEPFAR Approvals your screen will appear as follows:



- On the left hand side of the screen you can select the data set (MER, SIMS, EA, etc.) which you'd like to submit for approval.
- On the right hand side of the screen you can select the reporting period as it applies to the data set.

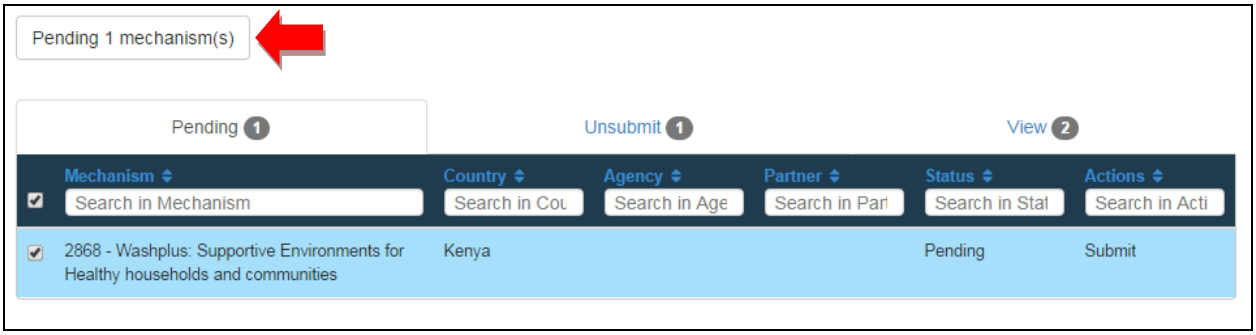
The example below demonstrates what the PEPFAR Approvals screen will look like after you select a data set from the menus displayed above.



2. From here, three tabs display any applicable mechanisms that have been submitted for review and approval.

- **Pending:** This tab displays mechanisms with data that have not been submitted for review and approval. (These may be submitted).
- **Unsubmit:** This tab lists the mechanisms that have been submitted to the agency level for review and approval, but the agency has not yet accepted them.
- **View:** This tab displays all of your mechanisms, regardless whether it appears under Pending or Unsubmit.

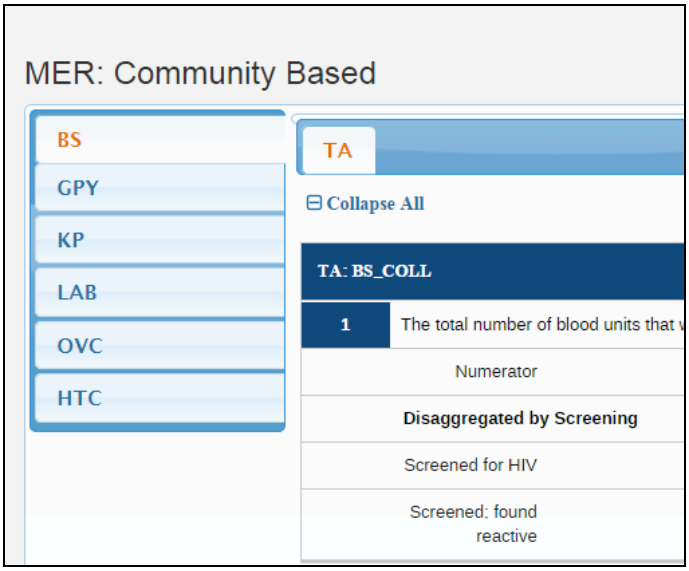
Please note that within each of the tabs displayed, you can select one or more of the listed mechanisms and execute the Action by selecting the applicable checkbox for each of the mechanisms listed.



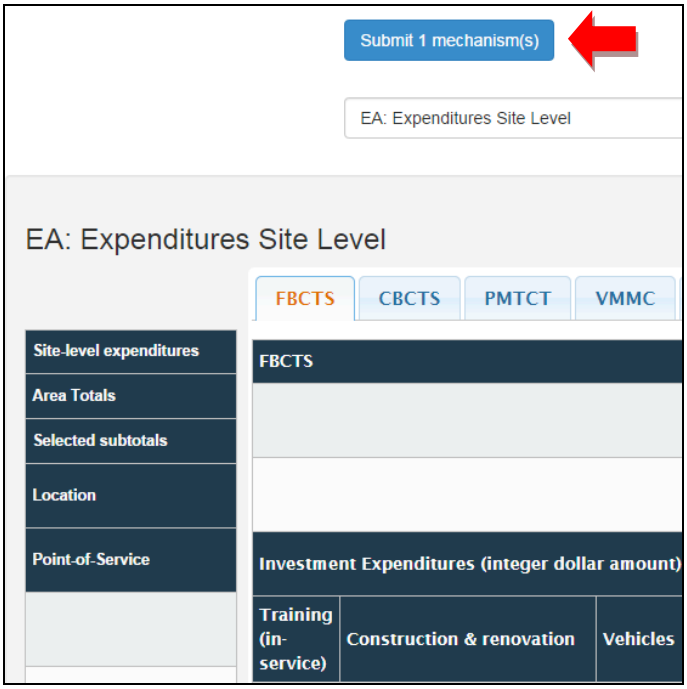
*Example: A mechanism from the Pending tab is selected and the **Pending 1 Mechanism** button displays and allows the Implementing Partner to submit the mechanism to the Agency level for review and approval.*

3. Once a desired mechanism is selected from one of the tabs and the applicable action has been chosen, click the action button located above the tabs (*highlighted above via the red arrow*).

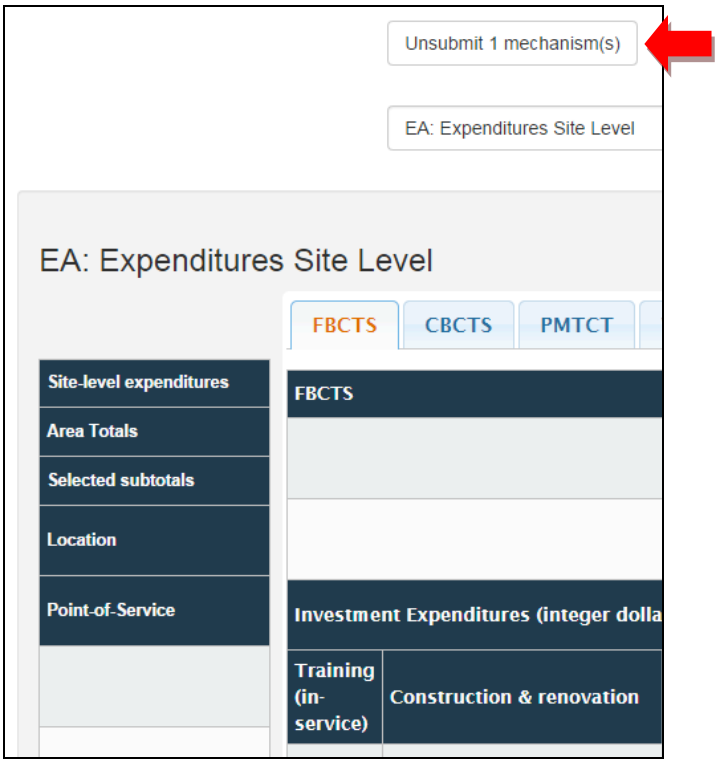
- The dataset form will display allowing you to review/submit/unsubmit the data.



4. **Submit Data tab**: Once the mechanism data has been reviewed and is ready for submission to the applicable Agency, click the **Submit** button.

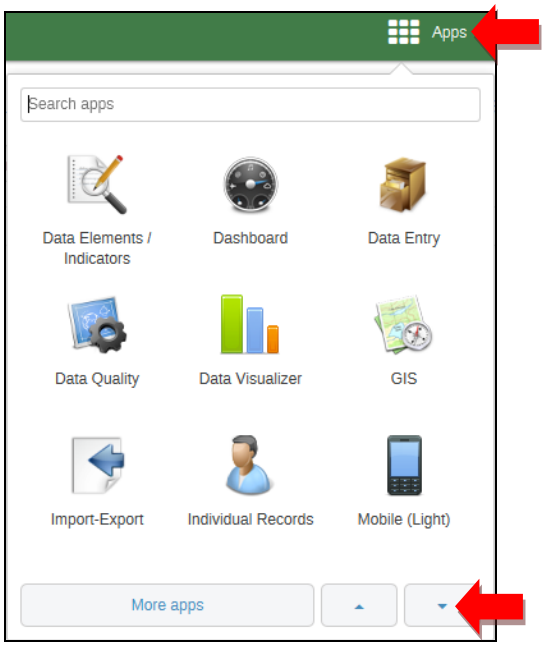


5. **Unsubmit Data tab:** Once the data has been reviewed and has been determined unready for approval, click the **Unsubmit** button.

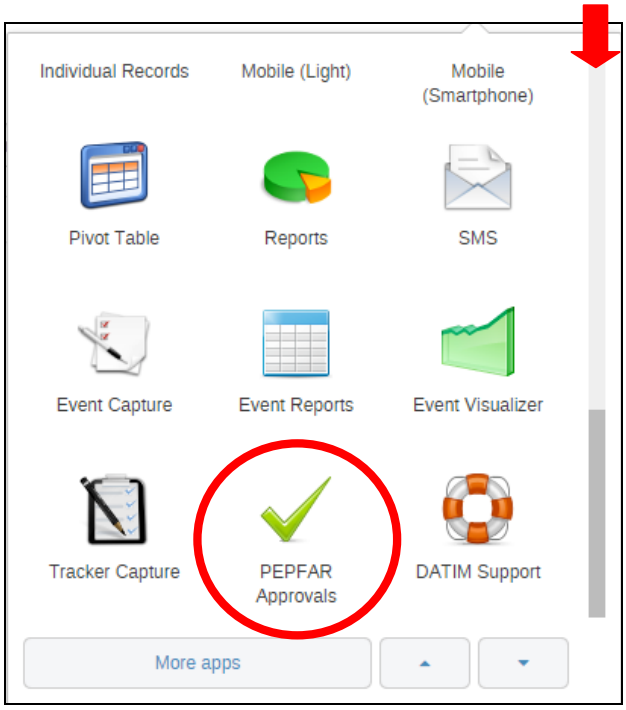


2.6 PEPFAR Approvals (Agency Activity Managers)

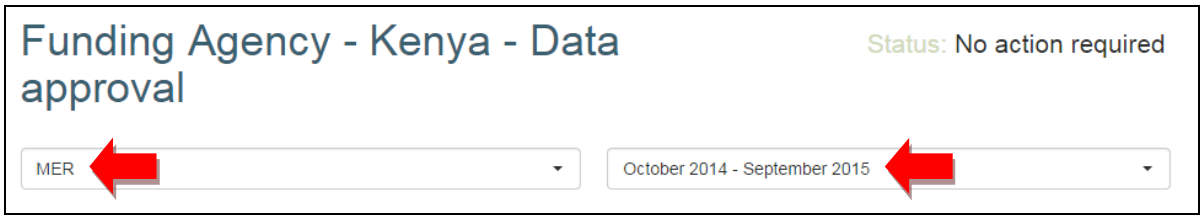
To begin the PEPFAR Approval process for indicator data pertaining to a mechanism, select the **Apps** feature on the navigation ribbon located at the top right of the screen. Once accessed, select the **arrow button** at the bottom of the App section to see more options (if necessary).



Use the side bar to scroll down to the bottom of the application options. Select **PEPFAR Approvals**, which will appear in the application list.

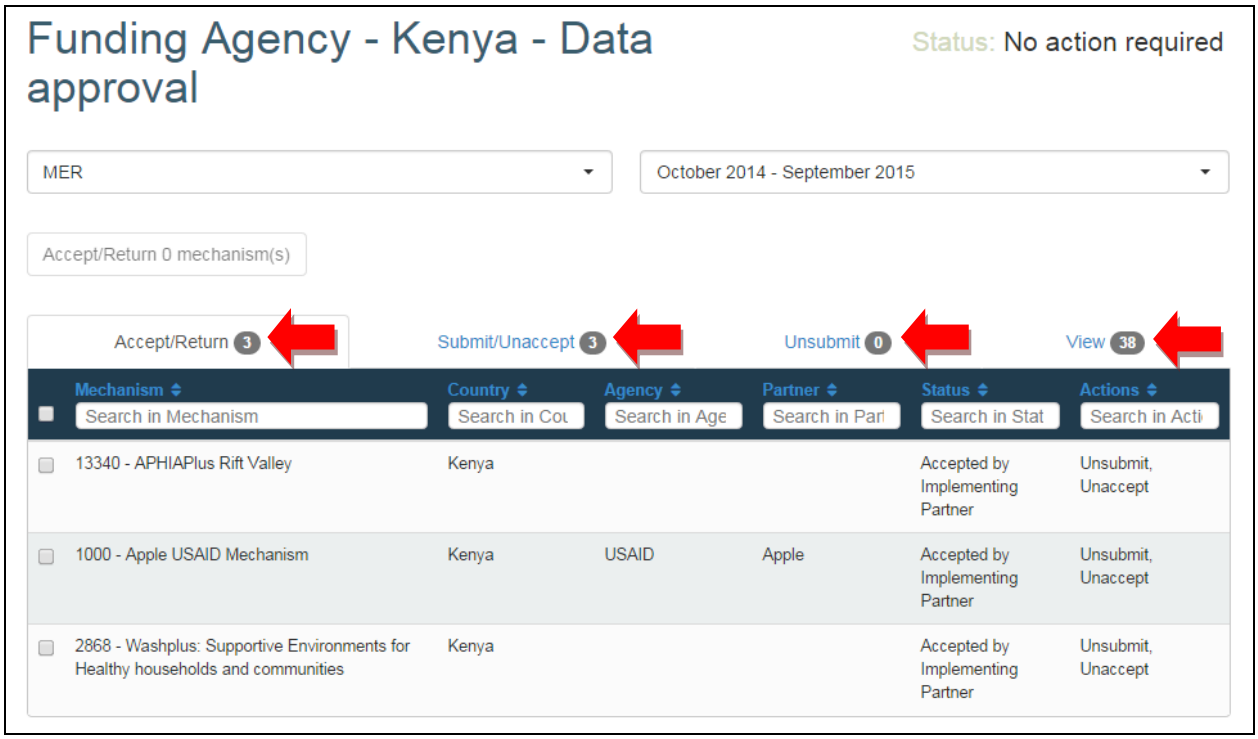


1. Once you have selected PEPFAR Approvals, your screen will appear as follows:



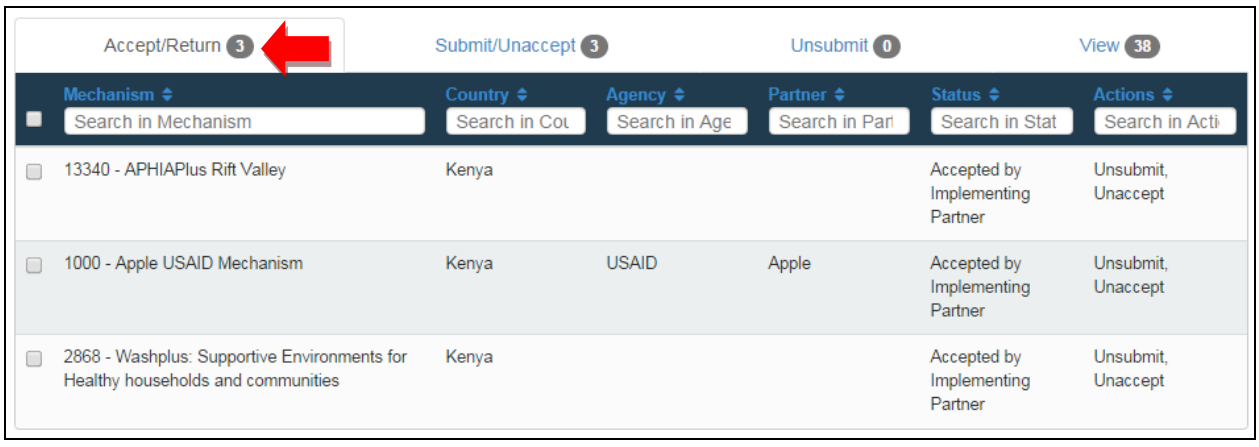
- On the left hand side of the screen you can select the data set (MER, SIMS, EA, etc.) that you'd like to review and submit (or reject) for approval.
- On the right hand side of the sceen you can select the reporting period as it applies to the data set you are attempting to review and approve.

The example below demonstrates what the PEPFAR Approvals screen will look like after you select a mechanism(s) from the menus displayed above.



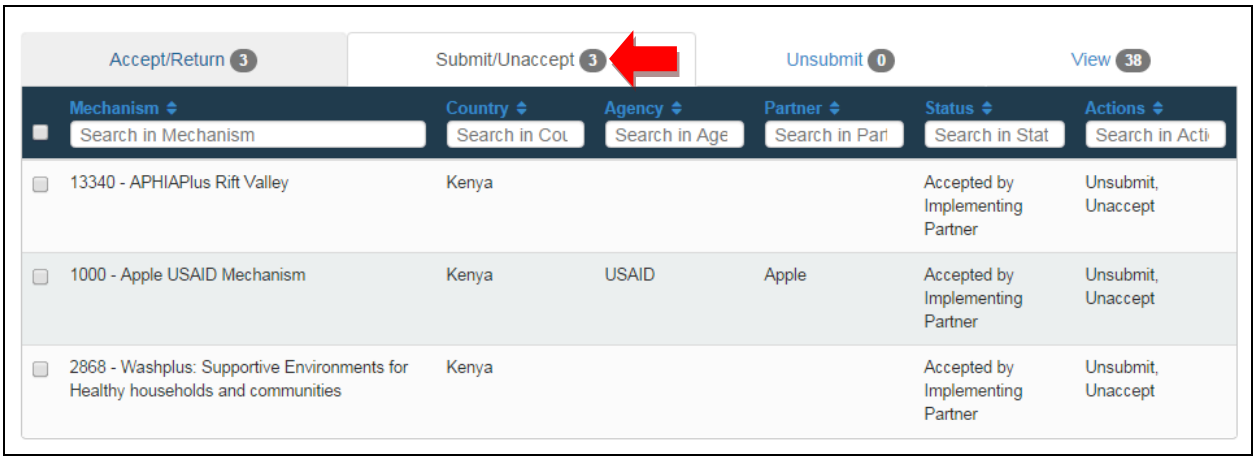
2. From here, four tabs display with all applicable mechanisms that have been submitted by IPs for agency review and approval.

- **Accept/Return tab:** This tab displays the mechanisms that have been submitted from Implementing Partners for agency review and approval.
    - **Accept:** Moves the mechanism to the Submit/Unaccept tab *(See Step 4)*
    - **Return:** Rejects the mechanism to the Implementing Partner *(See Step 4)*

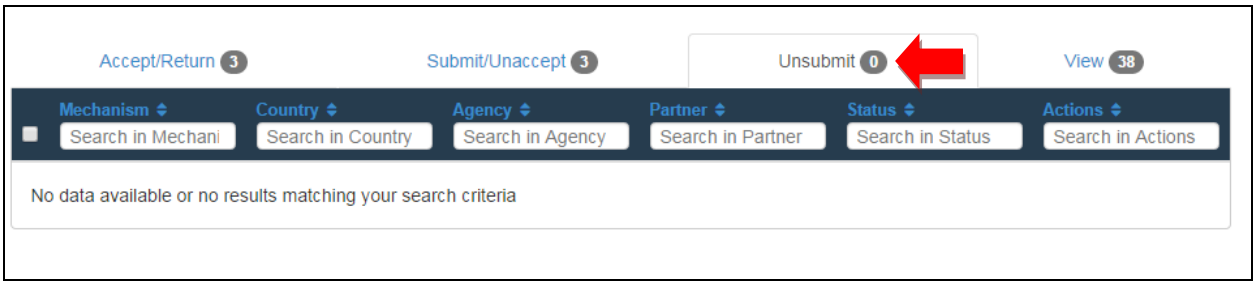


- **Submit/Unaccept tab:** This tab displays the mechanisms that have been submitted by Implementing partners and have been reviewed by you and are ready for submission to the Country Team level.
    - **Submit:** Approves the mechanism and moves it to the Country Team level for review *(See Step 5)*

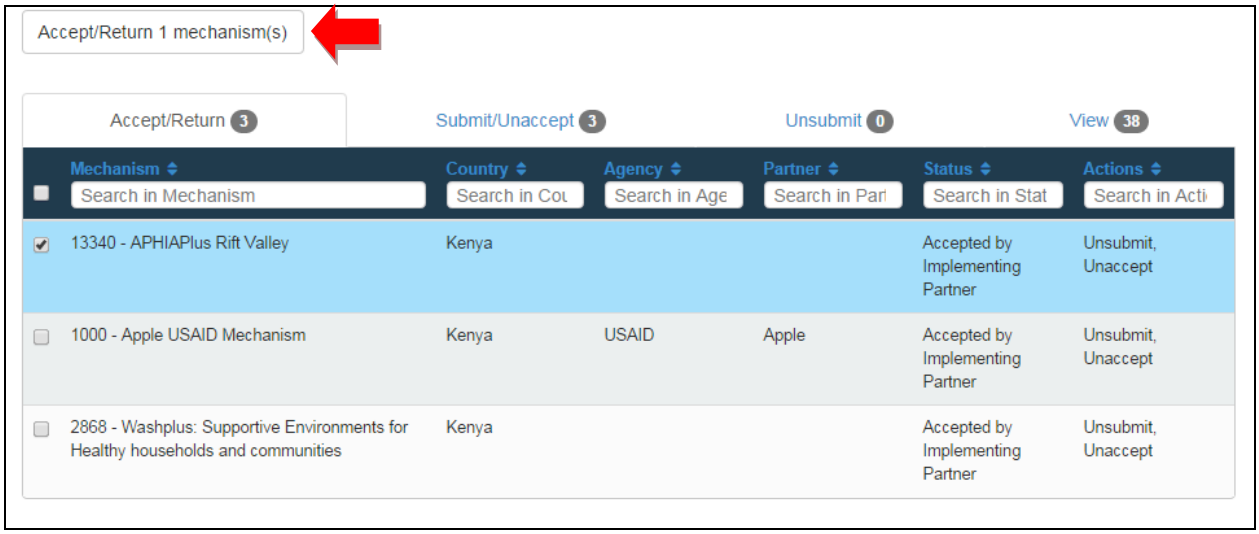
- **Unaccept:** Rejects the mechanism and moves it back to the Accept/Return tab *(See Step 5)*



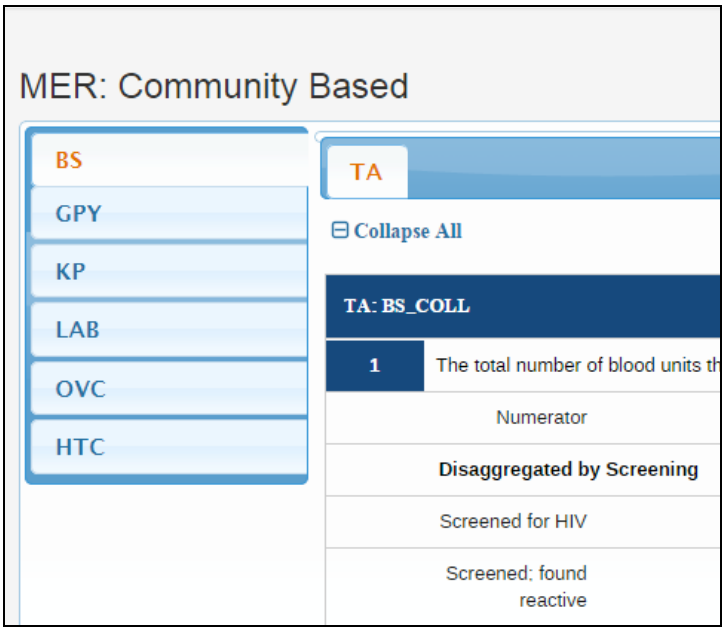
- **Unsubmit tab:** This tab lists the mechanisms that have been submitted to the Country Team for review but have not yet been accepted and reviewed. The mechanism can be unsubmitted by you for edits and additional review if necessary. *(See Step 6)*



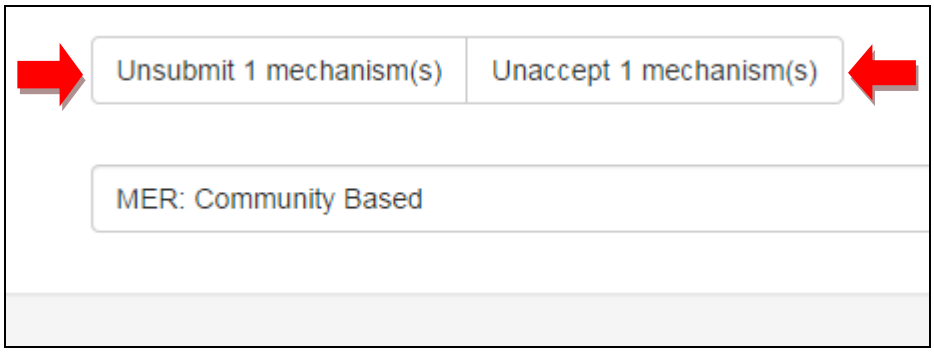
Please note that within each of the displayed tabs, you can select one or more of the listed mechanisms and execute the applicable action by clicking the button on the tab. (*See Steps 4, 5, 6 for examples)*



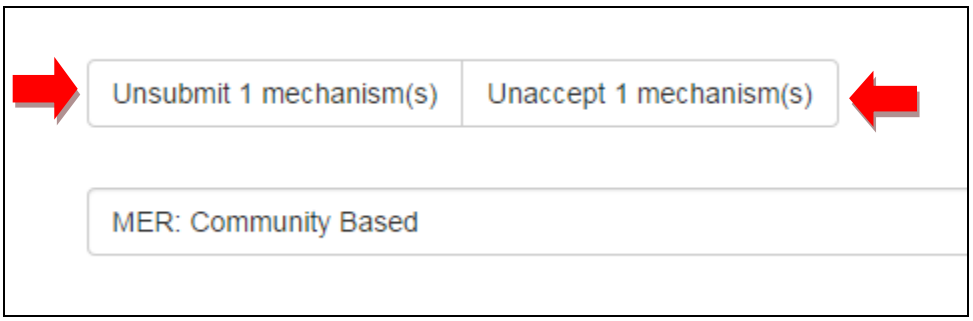
3. Once a desired mechanism(s) is selected from one of the tabs by clicking the checkbox, click the applicable button located above the tabbed view to display the submitted data.
    - The data set form will display allowing you to accept/return/submit/unaccept/unsubmit/view the data.



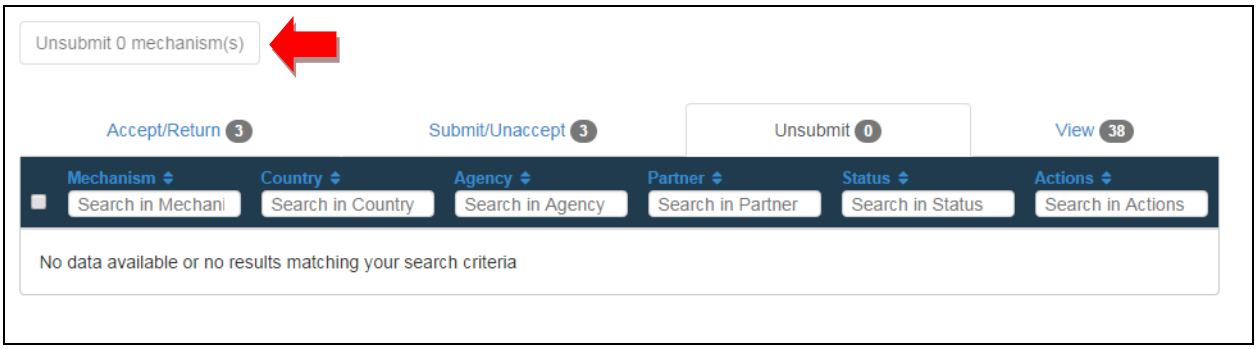
4. **Accept/Return Data buttons:** Once the data has been reviewed and is ready for acceptance and submission, you can click the **Accept** button. If the data is reviewed and edits are required by the Implementing Partner, click the **Return** button. *(See the image below for a highlighted example)*



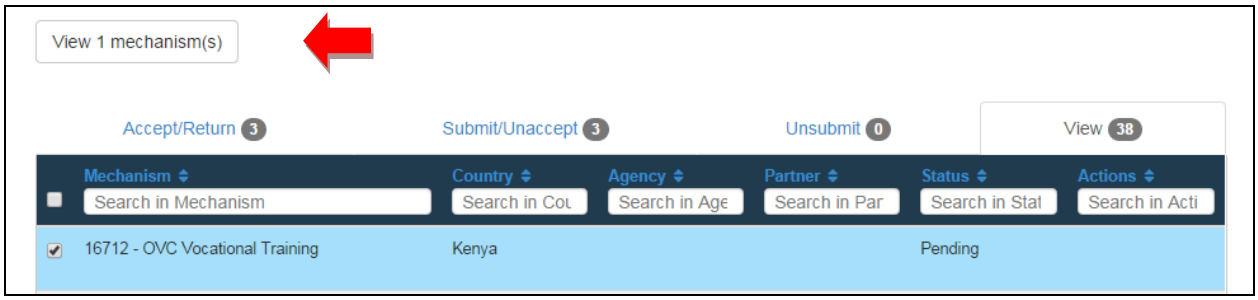
5. **Submit/Unaccept Data buttons:** Once the data has been accepted and is ready for submission to the Country Team level, click the **Submit** button. If the data is reviewed and additional edits are required, click the **Unaccept** button to return the mechanism to the Accept/Return tab.



6. **Unsubmit Data button:** Once the data has been submitted to the Country Team level and additional edits are discovered, you can click the **Unsubmit** button to return the mechanism to your Submit/Unnaccept list.

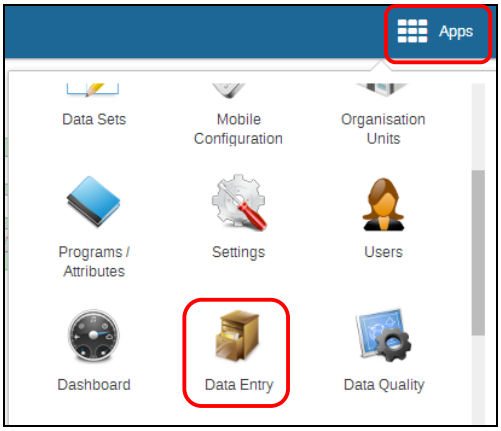


7. **View Data button:** To review any mechanism in the data in the form, select the mechanism by clicking the applicable checkbox then click the **View** button.

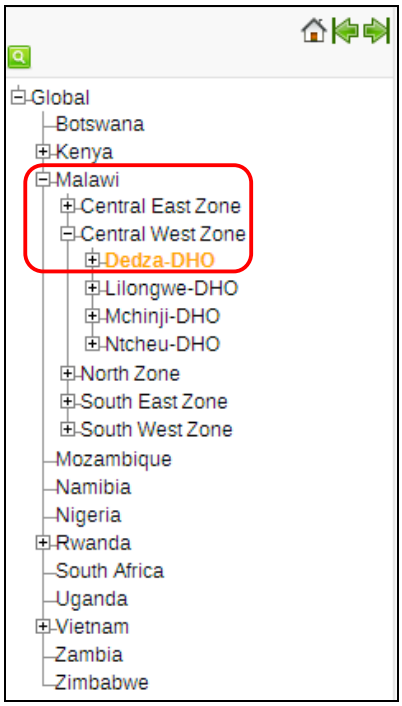


2.7 SIMS Data Entry

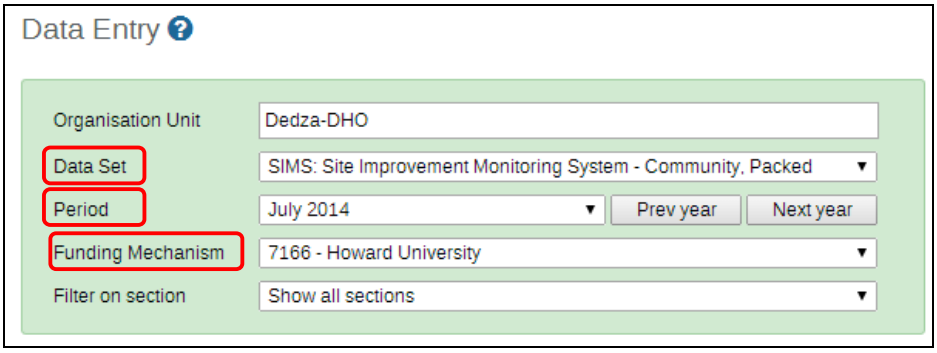
1. From the Apps button on the blue navigation ribbon located at the top of the screen, select **Data Entry**.



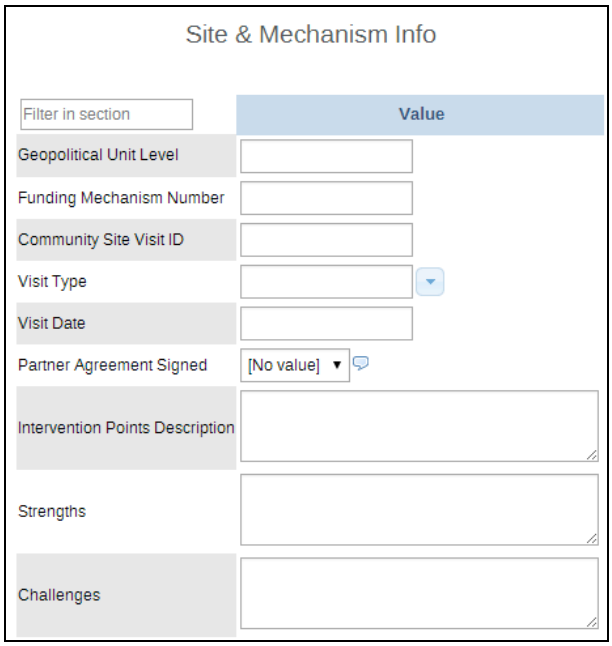
2. Once the Data Entry page displays, enter select your **country, zone, and region** from the dropdown list on the left-hand navigation bar. This will allow you to select the SIMS data entry form. *Please Note: You do not report SIMS data at the site level.*



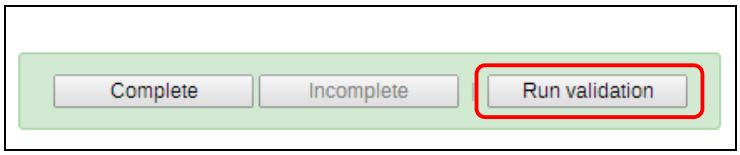
3. From the Data Entry form, select desired data in the **Data Set (SIMS: Site Improvement Monitoring System – Community, Packed), Period,** and **Funding Mechanism** dropdown fields.



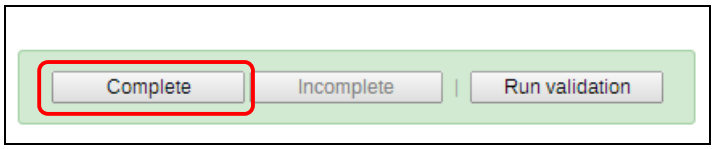
4. Once a **Funding Mechanism** is selected from the dropdown list, the applicable SIMS data entry forms will display and data can be entered into the desired fields for each indicator.



5. Once all data has been entered for the specified data set, click the **Run Validation** button to ensure that data entered in an acceptable format.

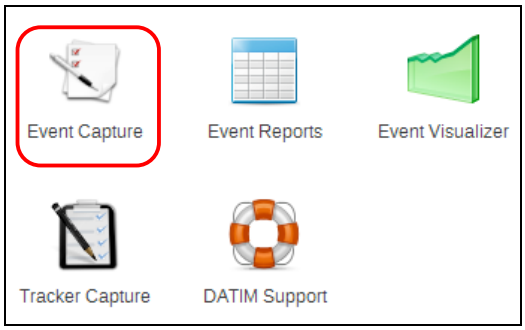


6. Once the data passes validation, click Complete. The data has now been submitted for approval and submission by the County Team.

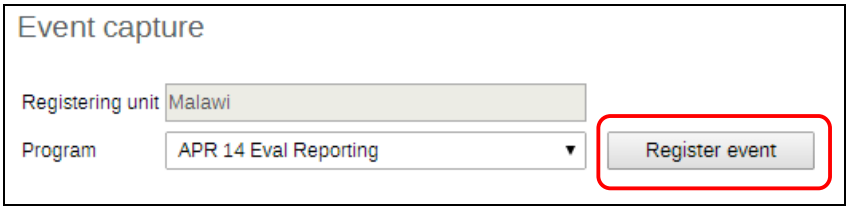


2.8 Eval Reporting Data Entry

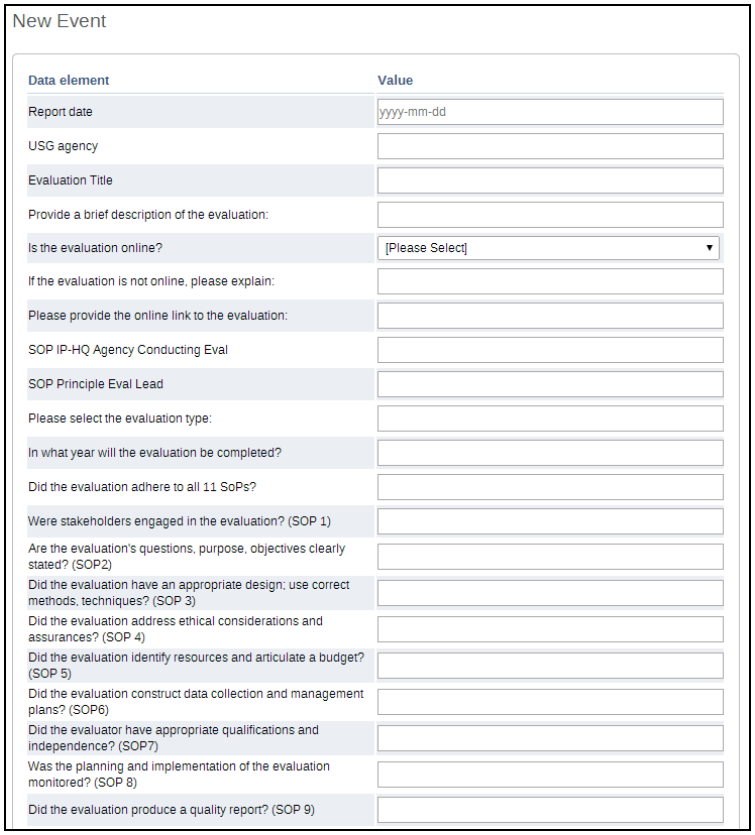
1. From the Apps button on the blue navigation ribbon located at the top of the screen, select **Event Capture**.



2. Once the Event Capture screen displays, select **Register Event**.



3. Once the New Event form displays, populate the necessary information.


New Event
Data element
Value
Report date
yyyy-mm-dd
USG agency
Evaluation Title
Provide a brief description of the evaluation:
Is the evaluation online?
[Please Select]
If the evaluation is not online, please explain:
Please provide the online link to the evaluation:
SOP IP-HQ Agency Conducting Eval
SOP Principle Eval Lead
Please select the evaluation type:
In what year will the evaluation be completed?
Did the evaluation adhere to all 11 SoPs?
Were stakeholders engaged in the evaluation? (SOP 1)
Are the evaluation's questions, purpose, objectives clearly stated? (SOP2)
Did the evaluation have an appropriate design; use correct methods, techniques? (SOP 3)
Did the evaluation address ethical considerations and assurances? (SOP 4)
Did the evaluation identify resources and articulate a budget? (SOP 5)
Did the evaluation construct data collection and management plans? (SOP6)
Did the evaluator have appropriate qualifications and independence? (SOP7)
Was the planning and implementation of the evaluation monitored? (SOP 8)
Did the evaluation produce a quality report? (SOP 9)

4. Upon completion of the data entry process, select Save and Go Back.

2.9 Editing and deleting data

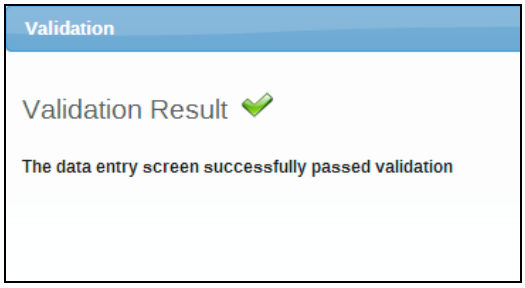
If you wish to enter data which has already been entered, simply replace the data entry value with the update values.

If you want to delete a data value completely, you should select the value of interest, and press "Delete" on your keyboard. If you enter a zero and the data element has been configured to not store zeros, the previous data value (i.e. the one you wish to modify) will not be overwritten with the new value. Therefore, it is better practice to delete the data value completely (waiting for the cell to turn green) and then to enter the new value.

2.10 Validating data in the form

When all the available values for the form has been filled in you can run a validation check on the data in the form. Click on the "Run Validation" button in the top right corner. All validation rules which involve data elements in the current form (dataset) will be run against the new data. Upon completion you will be presented with a list of violations or a simply a message that says "The data entry screen successfully passed validation". See the Data Quality chapter for information on how to define such validation rules.

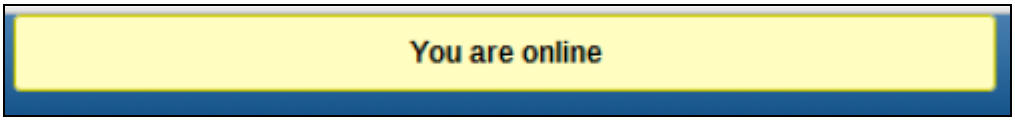
When you have corrected any erroneous values and are done with the form the recommended practice is to click on the Complete button below the form to register the form as complete. This information is used when generating completeness reports for district, county, province or the national level.



2.11 Offline data entry

The data entry module will function even if during data entry the Internet connectivity is not stable. In order to utilize this functionality, you must login to the server while Internet connectivity is present, but if during data entry, the Internet link between your computer and the server becomes unstable, data can still be entered into the data entry form, saved to your local computer, and then pushed to the server once the Internet connectivity has been restored. Data can be entered and stored locally while being offline and uploaded to the central server when online. This means that the on-line deployment strategy will be more viable in areas with unstable Internet connectivity. The total bandwidth usage is greatly reduced since forms no longer are retrieved from the server for each rendering.

When the server is able to be reached through the Internet connection, a message is displayed at the top of the data entry screen below.



If the Internet connection should disconnect for some reason during the data entry process, this will be detected by the application, and you will be informed that your data will be stored locally.

Data entry can proceed as normal. Once you have entered all of the necessary data, and the application detects that the server is back on-line, you will be informed that you have data which needs to be synchronized with the server.

Once the data has successfully synchronized with the server, you will receive a confirmation message that the data has been successfully uploaded to the server.

3.0 Using Reporting Functionality

3.1 Reporting functionality in PEPFAR DATIM

The reporting module in DHIS 2 provides a range of reporting alternatives, and this section will explain how to use them to view and analyze data. Another section explains how to configure and set up the various reporting tools.

Standard reports: Standard reports are built on report tables, but are more advanced in its design allowing for more cosmetics and styles. These reports can also combine multiple tables and charts in the same report and be made available as one-click reports that are very easy to use. These reports can be downloaded as PDF files which make them ideal for printing as well as sharing offline.

Dataset reports: Dataset reports are simply a printer friendly way to look at the data entry forms with either raw or aggregated data (over time or place). The design used in data entry will be used also in the data set reports. This will work only for data sets that has a custom data entry form set up.
Dashboard: The fastest way to view your data. The dashboard can display up to four updated charts as well as shortcuts to your favorite reports, report tables, and map views. Each user can configure a personal dashboard.

Data Visualizer: Do flexible visualizations of your data as charts and data tables. Any number of indicators and data elements can be included. Several chart types are available, such as column, stacked column, line, area and pie charts. The charts can be saved in order to be easily retrieved later and can also be put on your personal dashboard. Charts can be downloaded as image and PDF files to your local computer.

Report tables: These are very configurable table outputs of your data, either showing raw or aggregated data, as well as indicator data. These tables are used as either a data source for more advanced reports, for export to external systems, or as a crude report itself, and are exportable to PDF, excel, CSV and jasper design files. These tables represent a very dynamic, flexible and quick way to look at the data. Report tables can be set up with parameters to make them reusable over time and place.

Orgunit distribution reports: These reports are generated off the orgunit group set information and can show what types (and how many of each type) of health facilities that are located in a given area (any level in the hierarchy). These reports are automatically generated and displays the information in both tables and charts, and downloads in PDF, excel, and CSV are available.

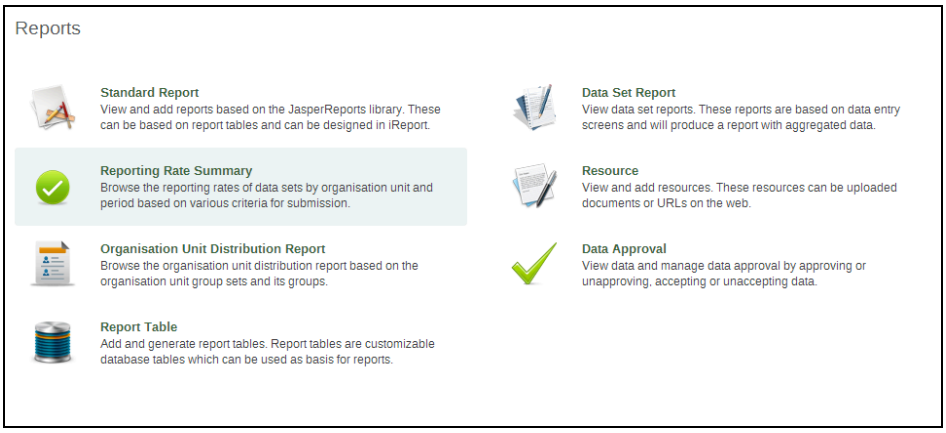
Reporting rate summary: These reports provide a nice overview of how many facilities that have submitted their data for a given dataset and period. Here you can get both the counts and the percentages showing the reporting rate for all or single data sets.

Excel pivot tables: Excel pivot tables represent a very powerful way to analyze your data and DATIM links directly to the pivot tables so that all the data will be available and updated in your Excel file. This can be a very useful tool for users that prefer working with the data offline. To update your local pivot tables you need the myDatamart tool which connects to the online server and downloads the latest data. This update will typically take place once a month when new data is available, but do not require a constant internet connection like the other reporting tools (if you are connecting to an online DATIM server).

Web-based pivot tables: The built in pivot table tool is a simple web-based tool to display indicator data by orgunit and period in a typical pivot table view and allows for some basic pivoting manipulations of the tables. It is a quick and easy way to look at many indicator values at the same time (by orgunit and/or period), but does not have the same functionality as the offline Excel pivot tables.

3.2 Using standard reports

You access the available reports from the Services drop-down menu, by selecting Reports. In the report menu in the left bar, click Standard Report. A list of all pre-defined reports will appear in the main window.

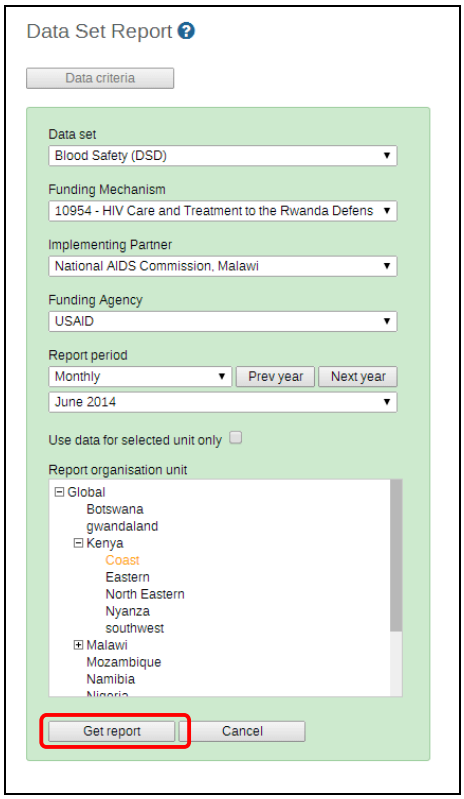

Reports
Standard Report
View and add reports based on the JasperReports library. These can be based on report tables and can be designed in iReport.
Data Set Report
View data set reports. These reports are based on data entry screens and will produce a report with aggregated data.
Reporting Rate Summary
Browse the reporting rates of data sets by organisation unit and period based on various criteria for submission.
Resource
View and add resources. These resources can be uploaded documents or URLs on the web.
Organisation Unit Distribution Report
Browse the organisation unit distribution report based on the organisation unit group sets and its groups.
Data Approval
View data and manage data approval by approving or unapproving, accepting or unaccepting data.
Report Table
Add and generate report tables. Report tables are customizable database tables which can be used as basis for reports.

You run/view a report by clicking on the white and green arrow next to the report you want. You will then see a report parameter window where you must fill in the values needed for orgunit and/or reporting month, depending on what has been defined in the underlying report table(s). Click on "Get Report" when you are ready. The report will either appear directly in your browser or be available as a .pdf file for download, depending on your browser settings for handling PDF files. You can save the file and keep it locally on your computer for later use.

3.3 Using report tables

Report tables are a simple-to-use tool for creating tabular analysis. To run a report table first navigate to the list of available report tables in Services->Reports->Report Tables and the click on the Green and white arrow (the first symbol in the operations list) next to the report table you want to view.

Report parameters: Most report tables have parameters, which mean that you can filter which orgunits and/or periods you want in the report. This makes the reports much more reusable. When you run the report table a Report parameter window will open and ask the user to input values for the selected parameters. The possible parameters are Reporting Month and Organization Unit, and either one of these or both will show in the window. After selecting the values click on the Get Report button.



Export/view options: When the report table is ready it will be displayed in a html view. The report table can be exported to PDF (for better printing and easier saving), excel, CSV, and also to a standard report format (Jasper) with a nicer table and a chart shown in PDF, or as a jasper design file for further improvements and changes to the report design before uploading it as a standard report (see the Creating standard reports section).

3.4 Using dataset reports

Dataset reports are printer friendly views of the data entry screen filled with either raw or aggregated data. These are only available for data sets that have custom data entry forms and not for default or section forms.

You can access data set reports from the Report menu under Services.

A Criteria window will appear where you fill in the details for your report:

Dataset: The data set you want to display.

Reporting period: The actual period you want data for. This can be aggregated as well as raw periods. This means that you can ask for a quarterly or annual report even though the data set is collected monthly. A data set's period type (collection frequency) is defined in data set maintenance. First select

the period type (Monthly, Quarterly, Yearly etc.) in the drop down next to Prev and Next buttons, and then select one of the available periods from the dropdown list below. Use Prev and Next to jump one year back or forward.

Use data for selected unit only: Use this option if you want a report for an orgunit that has children, but only want the data collected directly for this unit and not the data collected by its children. If you want a typical aggregated report for an orgunit you do not want to tick this option.

Reporting Organization unit: Here you select the orgunit you want the report for. This can be at any level in the hierarchy as the data will be aggregated up to this level automatically (if you do not tick the option above).

When you are done filling in the report criteria you click on "Generate". The report will appear in html view in a printer-friendly format. Use print and save as functions in the browser to print or save (as html) the report.

3.5 Using resources

The resource tool allows you to upload both files from your local computer to the DHIS server and to add links to other resources on the Internet through URLs. If you want to share the direct link to the DHIS resource you can right click on the "view resource" button and copy the link address.

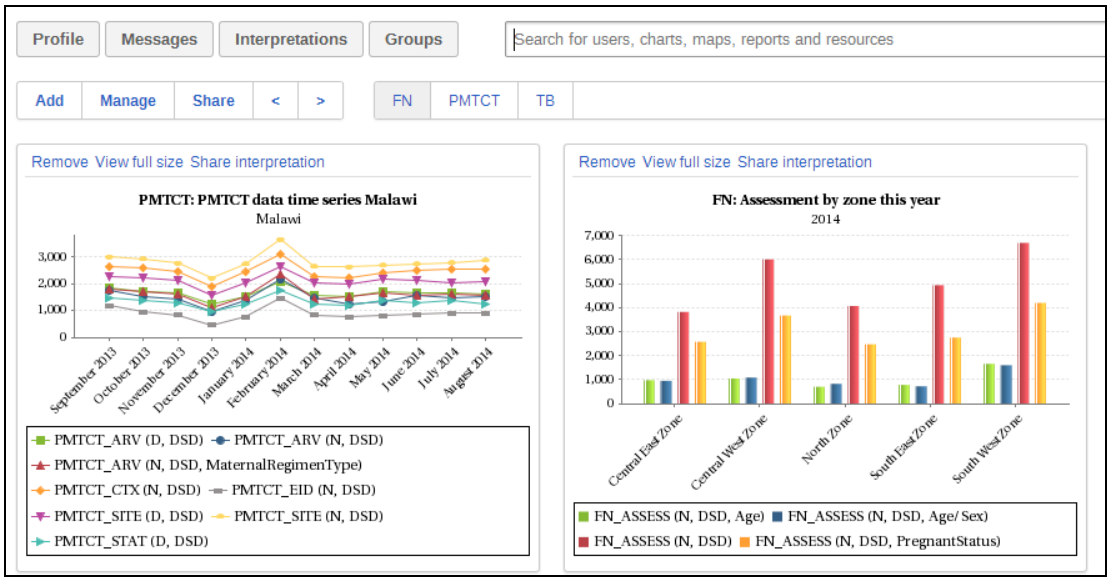
To create a resource click on the "Add new" button. Enter a name for the resource, then choose between uploading a file or external URL. If you chose file upload click "Choose file" and select your file your local computer. If you chose URL enter the link to the resource on the Internet. Then click "Save".

3.6 Using data visualizer

The data visualizer module can be accessed under "Services" in the top menu. See the chapter called "Using data visualizer" for a thorough explanation of this module.

3.7 Using the dashboard

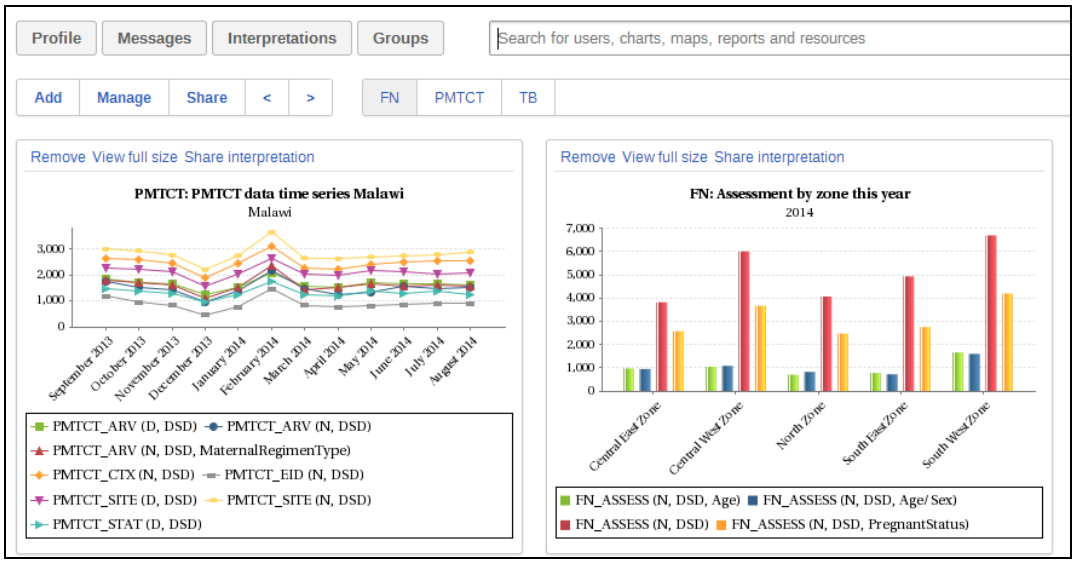
The dashboard is your first view into the data every time you log on to the system. Every user has its own dashboard, and a dashboard consists of 4 chart areas to the right and 3 short cut areas to the left.



Customize shortcut areas: Each of the three short cut areas can hold a list of items from one of the following objects; Reports (standard), Documents, Data mart exports, Report tables, Map views, RSS Health. To add a new object type to a shortcut area click on the Insert link just above the area. Then to populate the list you need to add items one by one from the Services->Reports menus. From the various lists of reports, report tables, charts etc. you can add an item by clicking on the pie chart icon next to the item you want to add to the dashboard.

E.g. to add your three favorite standard reports to the dashboard, first Insert Reports to one of the shortcut areas in the dashboard, then go to Services->Reports and click on Standard reports. From the list of standard reports you locate the reports you want and click on the pie chart icon next to each of the reports you want to add to the dashboard. When
you go back to the dashboard you will see the three reports listed in the shortcut area where you inserted Reports.

Use the Clear link above the shortcut area to empty an area. The Close link closes the insert menu without inserting a new object type. Customize chart areas: There are four chart areas. To insert a chart simply click on insert and click on one of the charts in the list. Use Close to close the list without adding a new chart, and use Clear to empty a chart area. These charts will be updated every time you open the dashboard, will automatically show data for the orgunit assigned to the current user, and will update the data when new periods are available.

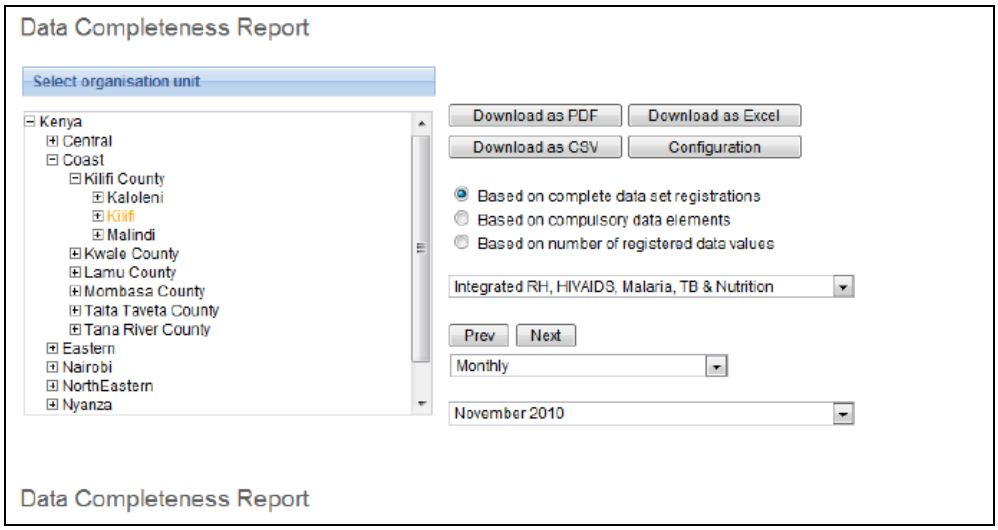


3.8 Using reporting rate summary

Access the reporting rate summary from the Services->Reports menu. Reporting rate summaries will show how many datasets (forms) that have been submitted by organization unit and period. You an use one of three different methods to calculate completeness; 1) based on complete button in data entry, 2) based on a set of defined compulsory data elements, or 3) based on the total registered data values for a dataset.

To run the report:

1. Select an orgunit from the tree.
2. Select one of the completeness methods.
3. Select all or one dataset (All will give you a report with all datasets for the selected orgunit. One dataset will give you a report with completeness for all the children of the selected orgunit.
4. Select a period type and a period from the list of available periods for that period type. Move back/forward one year by using the Prev/Next buttons.
5. Then the report will be shown automatically.
6. Change any of the parameters above and the report will be updated automatically.



3.9 Using organization unit distribution reports

3.10 Using data mart management

The web pivot table is a tool for displaying and pivoting indicator and data element data in an easy way. From the open data selection box start by selecting data type which can be data elements or indicators. Select the a group as a filter or leave it on "All". Select start date, end date and period type to indicate which periods you want to include in the pivot table. Continue by selecting an organization unit from the selection tree. The children at the level below the selected organization unit will be included in the pivot table. Then click "Get data".

After loading a pivot table you will see that indicators (or data elements) will appear on top as columns, while periods and organization units are combined as rows. If you want to pivot the table click on the "Pivot" button and select new dimensions. These dimensions will be displayed as columns in the table when clicking "Pivot".

In the pivot table you can click on any cell in order to show a menu. From this menu you can choose to visualize the relevant indicator, org unit and period as various chart variants.

To save the pivot table data to your local computer click the "Download as excel" button. The Excel workbook will show each period as a sheet.

4.0 Dashboards

Dashboards are intended to provide quick access to individual users to the data which has been stored in PEPFAR DATIM. Dashboards consist of several sections, some of which provide links to reports or mapview which have already been defined. Other sections of the dashboard allow users to add charts which have been defined and made available through the charting module.

4.1 Setting up the dashboard

The dashboard is divided into two main sections. The right-side pane (denoted as A in the screenshot below) can be used to contain links to reports, documents (static reports), report tables, map views, and an RSS Health feed. The leftside zone (denoted as B in the screen shot) can be used to contain up to six separate charts which have been previously created in the charting reporting module.

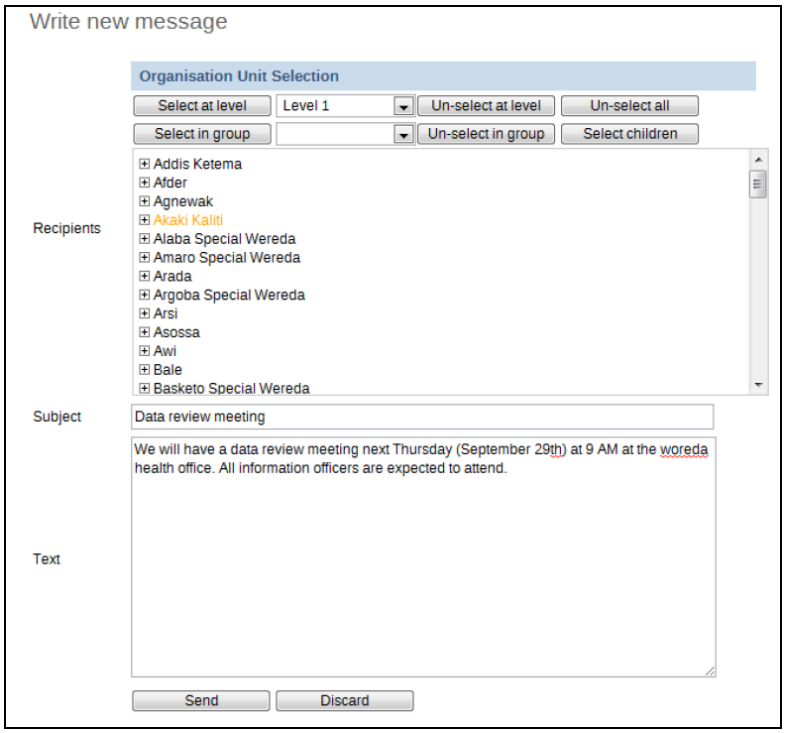
4.2 Messages and feedback

PEPFAR DATIM has certain functions to facilitate communication between different users and user groups. This type of communication is important to facilitate feedback regarding data quality, timeliness of submissions, or to simply answer a question which a particular user may have.

Feedback messages are sent to a particular group of users and can be sent by all users who have access to the dashboard module. In order to enable the receipt of feedback messages sent from the dashboard, you must set the system setting "Feedback recipients" which is available from the Maintenance->System settings dialog. Be sure to define a user group (e.g. "Feedback recipients") with all of the users who should receive feedback messages. Refer to the section in this manual on "User groups" for more information of how to do this. Once the "Feedback recipients" user group has been defined, each time a feedback message is sent, it will appear as a message in each of the "Feedback recipients" message queue within DHIS2. Note that messages will not be sent to users email addresses, but will only appear within the PEPFAR DATIM application.

To send a new feedback message, simply select "Write feedback" from the dashboard. Provide a subject and text in the respective text boxes. The message will appear in the specified user’s entire message queue.

Messages can be sent to specific groups of users who have been assigned to particular organization units. To write a new message, simply click "Messages" from the dashboard screen and then press the "Write message" button. Select an organization unit (or group of organization units) from the Recipients" organizational unit tree. Provide a Subject and Text. To send the message, press the "Send" button. You can discard the message by pressing the "Discard" button as seen in the screenshot below.



To read messages which have been sent to you, select "Messages" from the "Dashboard". You messages will be displayed as a list. Click the desired message to read all of the messages in this particular conversation.

5.0 User profiles

With profiles, users can alter the appearance of their PEPFAR DATIM, change the interface language, and enabled SMS and email notifications. Users can also enter information into their "Profile".

5.1 User settings

To access the user settings menu, select "Profile->Settings". You can select the interface language and the database language. The interface language refers to the translation of the user interface of the PEPFAR DATIM software. The database language refers to the translated content of the metadata contained in the system, for instance, data elements and indicators. Different interface styles can be set to alter the appearance of the system.

User can choose to receive their messages via email and/or SMS by ticking the appropriate check boxes.

5.2 User profile

Users can choose to enter more data, such as their email and phone number, job title, gender, birthday, etc. into their profile.

Just select "Profile->Profile" from the main menu.